



EXERCISE 9: MANUAL EVENTS (PRN) - ENROLLING AN EMPLOYEE INTO THE DEFINED CONTRIBUTION RETIREMENT PLAN AND (PRT) – TERMINATING COVERAGE IN DEFINED BENEFIT RETIREMENT PLAN

In this exercise, you will enroll an individual into the Defined Contribution Retirement Program by adding a PRN event. Participation in the Defined Benefit Program must also be terminated after enrolling the participant in the Defined Contribution Retirement Plan by using a PRT event.

STEP 1: SET UP MANUAL PRN & PRT EVENTS

Navigation: Benefits>Manage Automated Enrollment>Events >HE/State Manual Events

1. Enter Emplid of employee and press Search button at the bottom of the page.
2. Enter date coverage is to begin in the Defined Contribution Plan as the Event Date. (This date will be provided on the notification you receive from NDPERS.)
3. Enter PRN (as needed enrollments) as BAS Action or select it from the lookup list.
4. The rest of the fields will default in with the appropriate information – they should not be changed.
5. Save the screen.
6. To set up the PRT event, press the add button (+) at the bottom of the page. Enter the same event date from step 2 and PRT (as needed terminations) as BAS Action.
7. Save the screen.

Before you can process the event, it needs to be assigned to your schedule. This is a centralized activity that automatically runs every half hour.

STEP 2: PREPARE OPTIONS

Navigation: Benefits>Manage Automated Enrollment>Events>Run Automated Event Processing

1. Enter your Run Control ID (business unit followed by EM)
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. The Benefits Administration "PSPBARUN" process will be checked by default.
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.



9. When the process finishes (Success), press “Go Back to Run Control” to take you back to Ben Admin.

STEP 3: VERIFY PROCESS STATUS

Navigation: Benefits>Manage Automated Enrollment>Events>Update Event Status or Update Processing Controls

PeopleSoft will only process one event at a time. Enrollments are processed first.

1. If you use Update Event Status, you will enter the Emplid and press Search.
2. If you use Update Processing Controls, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRN event should now be Prepared (PR). This means that benefits can now be elected.

STEP 4: ELECT OPTIONS

Navigation: Benefits>Manage Automated Enrollment>Participant Enrollment>Perform Election Entry

1. Enter your Schedule ID.
2. Enter the Emplid of your PRN and press Search.
3. This will take you to the Option Election page. Scroll down to Plan Type 7A, Defined Contribution Retirement Plan. Use the lookup feature to select an option or enter “1” in the Option Code field. Do not remove the Defined Benefit Plan participation at this time. The rest of the plan types will default to what the employee currently has and should be left untouched.
4. After you have finished with your election, press Save.
5. The event Process Status will now change to Entered (ET).

STEP 5: FINALIZE/ENROLL

Navigation: Benefits>Manage Automated Enrollment>Events>Run Automated Event Processing

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be “Process Existing Events Only”.
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name “PSNT” if it is not already selected.
7. The Benefits Administration “PSPBARUN” process will be checked by default.
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.



9. When the process finishes (Success), press “Go Back to Run Control” to take you back to Ben Admin.

STEP 6: VERIFY FINALIZED EVENT

Navigation: Benefits>Manage Automated Enrollment>Events>Update Event Status or Update Processing Controls

1. If you use Update Event Status, you will enter the Emplid and press Search.
2. If you use Update Processing Controls, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRN event should now be Enrolled and the Event Status is Closed.
4. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is:

Navigation: Benefits>Manage Automated Enrollment>Review Processing Results>Processing Messages

5. If there is an Election Error, you will need to correct the error by going back to the Election Entry page. Once you fix the problem, you will need to rerun the Ben Admin process by going back to Run Automated Event Processing.
6. If you have no errors, and the event is closed, then the employee is enrolled in the benefit plan(s).

STEP 7: TERMINATING COVERAGE IN THE DEFINED BENEFIT PLAN

1. Follow Steps 2-3 above, replacing PRN with PRT.
2. On Step 4, scroll down to Plan Type 70 PERS and delete the Option Code. The rest of the plan types will default to what the employee currently has and should be left untouched.
3. Continue with Steps 5 and 6.

STEP 8: VERIFY BENEFIT PLAN ENROLLMENT

Navigation: Benefits>Enroll in Benefits>Retirement Plans

1. The purpose of this step is to verify that the employee is enrolled into the benefit plan(s). You will not change anything here.
2. You should see an enrollment record for the defined contribution plan.
3. Plan type
4. Coverage begin date = Date taken from NDPERS Defined Contribution Election Notification letter.
5. Deduction begin date = Same date as coverage begin date.
6. Coverage Election = Elect
7. Benefit Plan = Plan elected
8. Coverage Code = Coverage elected



9. For the defined benefit plan where there was a termination in participation, you should also see a record.
10. Plan type
11. Coverage begin date = Date you want coverage to be terminated.
12. Deduction begin date = Same as coverage begin date.
13. Coverage Election = Terminate

Questions or problems, contact the ITD Service Desk at 328-4470 or itdservicedesk@nd.gov